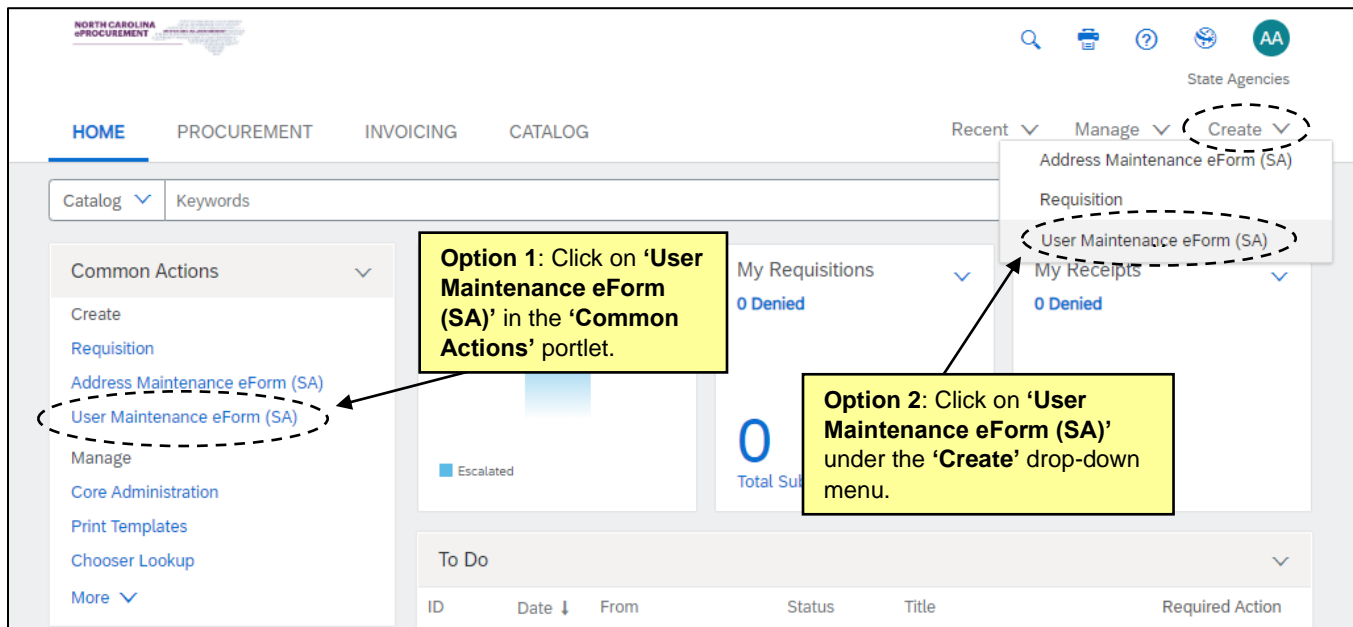# NC eProcurement

User Maintenance

Security Administrators within each entity have the ability to directly update user and address information within NC eProcurement. To do so, Security Administrators use electronic forms within the tool called eForms. These eForms are easy-to-use pages accessible from the **'Create'** shortcut menu. Only Security Administrators, Community College/School System EP Lite Administrators, and users belonging to the **'NC User Maintenance eForm'** or **'NC Address Maintenance eForm'** groups have access to the eForms. This process guide will show Security Administrators how to submit User Maintenance eForms for the Sourcing/Contracts modules.

I. User Maintenance

1. To access the User Maintenance eForm, select **'User Maintenance eForm (SA)'** from the **'Common Actions'** portlet or from the **'Create'** menu. This brings up the User Maintenance eForm page.

    Note: User Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the User Maintenance eForm through Guided Buying.

2. Begin by entering a title for the User Maintenance request (e.g. 'New Sourcing/Contracts User – John Doe').

3. Next, select the action to take by choosing from the **'Select Maintenance Mode'** drop-down menu. The Security Administrator can choose to **Add**, **Update**, or **Delete** a user.

4. Next, select which Module the request is for. For Sourcing or Contracts related activities, select **'Sourcing/Contracts'** from the drop-down menu.

5. Enter the NCID of the user for the action and click the blue **'Search'** button.

Notes:
- Users must have an active NCID User ID set up before they can be added, updated, or deleted from NC eProcurement through the User Maintenance eForm.

- An error message of **'Invalid NCID'** indicates that the NCID user does not exist.

- An error message of **'Disabled/Deactivated User'** indicates that the NCID user has already been deactivated.

- If the NCID is associated to an Individual or Business account, the Security Administrator will see an error message stating, **'Only a State or Local NCID account may be used with NCEP.'** NCID may be accessed by visiting https://ncid.nc.gov.

6. Entering a valid NCID will automatically populate the NCID Name and Email Address fields.

a. Adding A User

1. To add a new user to NC eProcurement Sourcing/Contracts, select **'Add'** on the **'Select Maintenance Mode'** drop-down on the **User Maintenance eForm** page.

2. Enter the NCID of the user for the action and click the blue **'Search'** button.

3. After selecting a valid NCID, fill in the necessary information for the new user's profile. The new user's Entity, Supervisor, and Groups will not be scoped by the Entity of the Security Administrator and must be manually selected.

   a. **Entity**: This field is for the State Agency, Community College, or School System that the new user belongs to.

   b. **Supervisor**: Select the user's NC eProcurement Sourcing/Contracts supervisor.

      i. **Note**: This field may be left blank if the user being added to Sourcing/Contracts has already been added to the Buying module.

   c. **Groups**: Select the appropriate groups to which the new user must belong in the Sourcing and Contracts modules. Users can be added to multiple groups. See **Section II. User Maintenance Group Definitions** for a list of groups and their descriptions.

Note: For additional assistance with the correct groups to select for a user, contact the NC eProcurement Help Desk.

The **'Supervisor'** field is not a required field and may be left blank if the user is already active in the Buying module.

Users can be added to multiple groups as necessary.

4. Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'** and **'NCEP Sourcing Approver'**) for review and approval.

5. Click **'Submit'** to request the new user.

   Note: At any time when creating a User Maintenance eForm, the Security Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

6. After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

7. Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

Users may add comments to their request if necessary.

To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.

b. Updating A User

1. To update an existing user in NC eProcurement Sourcing/Contracts, select **'Update'** on the **'Select Maintenance Mode'** drop-down on the **User Maintenance eForm** page.
2. Although the user already exists within NC eProcurement, entering their NCID will not automatically populate their Entity or Supervisor.

3. To update the Groups associated to the user, select the **'Remove'** or **'Add'** checkbox next to the **'Update Group'** option. These check boxes will bring up separate fields for the Security Administrator to choose groups to add and groups to remove.

Note: When removing groups from an existing user, the **'Remove Groups'** field will not display which groups the user is currently in. To determine which groups the user is already in, the existing user will need to view that information within their User Profile and inform the Security Administrator. Alternatively, the Security Administrator can request that information from the NC eProcurement Help Desk.

4. Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk ('**NC Help Desk'** and **'NCEP Sourcing Approver'**) for review and approval.

5. Click **'Submit'** to request that the NC eProcurement Help Desk update the existing user's information in the system.

6. After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

NC eProcurement
User Maintenance

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
L PURCHASE ORDER
SOURCING
BIDDING
BUY

7. Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

Users may add comments to their request if necessary.

To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.

c. Deleting A User

1. To delete an existing user in NC eProcurement, select **'Delete'** on the **'Select Maintenance Mode'** drop-down on the **User Maintenance eForm** page.

   Note: Before deleting a user, be sure that a new Project Owner has been assigned to active projects. See Managing a Sourcing Event or Advanced Contract Workspace for information on managing Team Members for projects.

2. No additional information is required to delete a user besides the **'Title'**, **'Select Maintenance Mode'**, **'Module'**, and the **NCID**.

3. Once the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**'NC Help Desk'** and **'NCEP Sourcing Approver'**) for review and approval.

After selecting **'Delete'** from the **'Select Maintenance Mode'** drop-down and entering the NCID, the User Maintenance eForm is ready to submit.

4. Click **'Submit'** to request that the NC eProcurement Help Desk delete the existing user's information in the system.

5. After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

II. User Maintenance Group Definitions

1. Each user has a unique profile with specific groups that they belong to, which informs what permissions and access that user has within NC eProcurement Sourcing/Contracts. The assigned groups are based on upon the individual's job functions and their responsibilities within their entity.

2. Groups determine a user's authority within the system. Each group has a set of permissions associated with it which determine what functionality and information a given user can access within NC eProcurement. Each user must belong to at least one group, but one group often has multiple permissions. Below is a list of available groups by module and the associated permissions in the group.

    Note: Security Administrators will be able to see all available groups. If a Security Administrator requests access to a group to which they should not belong, the request will be denied by the NC eProcurement Help Desk.

a. Groups for Sourcing

Group Name	Group Description
Sourcing Agent	• Creates, edits, and manages Sourcing Projects until completion • Edit and upload new documents • Unable to edit Sourcing Projects created by other Sourcing Agents
Internal User	• Search for and view Sourcing Projects

List of groups recommended for:

Profile	Groups recommended
Project Owner	Sourcing Agent Internal User
Approver	Sourcing Agent Internal User

b. Groups for Contracts

Group Name	Group Description
Contract Manager	• Create and owns a Contract Workspace through publication. • Edit documents on the Contract Workspace
Contract Approver	• Approve Contract Documents prior to publishing. • Comment on Contract Workspaces
Internal User	• Search for and view Contract Workspaces
Contract Administrator	• Import Legacy Contracts • 'Bulk Load' existing Contracts • Delete a Contract Workspace

List of groups recommended for:

Profile	Groups recommended
Project Owner	Contract Manager Internal User
Reviewer	Contract Manager Internal User
Approver	Internal User
Observer	Internal User
System Administrator	Contract Manager Contract Administrator Full Reporting Access Authorized